

## Goal-Setting Worksheet

Top 5 Values	Top 5 Financial Goals	Make Specific, Measurable, Attainable, and Action-Oriented	48 Hour Plan What actions will you take in the next 48 hours?	Enlist Help Who will you share your goals with?	Time Frame When will you finish?
<b>Example: Security</b>	Increase net worth by 10 percent next year	Increase contributions to RRSP by \$200 per paycheque	Call benefits person at work; change contributions plan by Friday	Call Pete (financial advisor) to review investment options in RRSP	<b>In two weeks, the new investment plan will begin</b>
<b>Family</b>					
<b>Health</b>					
<b>Self-realization / self-development</b>					
<b>Community</b>					